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Isle of Man Visitor Economy 2019–2024 Report

A) Current Demand Metrics

Visitor Volume (2019–2024): The Isle of Man (IoM) attracted **almost 330,000 visitors in 2019**, who spent around £142 million during their trips [1] (SQ:5). The COVID-19 pandemic brought a sharp collapse – the island closed its borders in March 2020 [2] (SQ:4), effectively halting tourism for over a year. As a result, **2020–2021 visitor numbers were only a small fraction** of 2019 levels (global travel fell ~74% in 2020 [3] (SQ:4)). **Full recovery began in 2022**, once border restrictions lifted in April that year [4] (SQ:5). Estimated **visitors in 2022 reached ~275,000** (about 88% of 2019 volume) [5] (SQ:5). In **2023, the IoM rebounded to ~318,000 visitors**, generating £183.2 million in spend [6] (SQ:3) – roughly back to pre-pandemic levels. **2024 marked a new high**: **329,613 total visitors**, the island's strongest tourism year in at least a decade [7] (SQ:4). This includes **307,934 travelers** by air/sea (business or leisure) plus **21,679 cruise passengers** [7] (SQ:4). Visitor numbers in 2024 surpassed the previous peak (2018's 316,654) and even modestly exceeded 2019's count [8] [9] (SQ:4).

Segmentation & Purpose of Visit: IoM's visitor mix is diverse. In **2019**, about **60% of visitors came for leisure/holidays**, with the rest split between visiting friends & relatives (VFR) and business trips [10] (SQ:5). By **2024**, the breakdown was **39.9% holiday tourists, 38.4% VFR, and 21.6% business travelers** [11] (SQ:4), indicating a balanced recovery across segments. Major **events** are a significant draw within the leisure segment. The world-famous TT motorcycle races each June attract tens of thousands – **around 45,000 visitors** in a typical year [12] (SQ:3). In 2024 the TT saw **a record ~47,000 visitors** (the highest since 2007) [13] (SQ:4), roughly **15% of all annual visitors**. Niche events (e.g. motorsport festivals, heritage and cultural events) also contribute: **23.9% of visitors in 2024 attended a motorsport event** during their stay [14] (SQ:5). Business travel, while a smaller share, has resumed as well – often linked to finance sector activity or conferences. Notably, **98–99% of visitors report high satisfaction**, saying the trip met or exceeded expectations [15] [16] (SQ:4), reflecting strength in the visitor experience across segments.

Spending and Stay Duration: Spending per visitor has risen significantly. In 2019, average spend per visitor was roughly **£430** (based on £142 m/330k) – by **2023 this grew to ~£576**, and in **2024 it reached £663 per visitor** [15] (SQ:4). Total visitor expenditure climbed from **£132.8 m in 2018** to **£212 m in 2024**, nearly a 60% increase [17] (SQ:4). This reflects higher travel and accommodation costs, longer stays, and a focus on higher-value experiences. **Overnight stays**: the **average length of stay is about 5 nights** per visitor [18] [19] (SQ:5), yielding over **1.6 million bed-nights in 2024** [20] (SQ:4). This is up from ~1.3 million bed-nights in 2018 (consistent with longer stays and more visitors). **Accommodation choices** have shifted slightly – in 2024 about **64% of visitors stayed in paid accommodations** (hotels, B&Bs, self-catering, camping), while ~36% stayed with friends or relatives [21] [22] (SQ:5). Serviced hotels and guesthouses remain the largest category (about 45–46% of visitors) [22] (SQ:5). Notably, 2023 saw **occupancy rates in hotels exceed 2019 levels by 9%**, and self-catering units by 5%, indicating a strong rebound in lodging demand [6] (SQ:3).

Seasonality Patterns: IoM tourism is **highly seasonal**, with a concentrated **peak in late spring and summer**. The **TT in late May/early June** traditionally kicks off the peak, followed by strong visitation through August. For example, in a normal year over **40% of annual visitors arrive in Q2 and Q3** (April–September). Winter months are much quieter – a challenge noted in strategy plans [23] (SQ:5). In 2019, the industry identified the **short season (3–4 months) as a weakness**, and by 2023 efforts had extended it to ~7–8 months [24] (SQ:4) with more events and attractions open in shoulder seasons. The government and Visit Isle of Man have actively worked to **extend the visitor season**. Initiatives included keeping **12 heritage sites and the steam railway open through October–November** and creating autumn festivals (e.g. the "Hop Tu Naa" Halloween festival) [25] [26] (SQ:4). These boosted off-peak visits (e.g. an autumn campaign in 2022 drew ~1,900 extra visitors in Nov) [27] (SQ:5). Nonetheless, **summer remains the dominant period** – many tourism businesses still rely on the TT and school-holiday surge to survive. The **seasonal skew is evident** in purpose: during April–Sept 2023, **58% of visitors were holidaymakers** [28] (SQ:5), whereas in winter the majority are VFR or business. Addressing seasonality continues to be a priority in the island's 10-year strategy.

Transportation Modes: IoM's visitor access is unique as an island – **most arrive by air or ferry**. In 2019, roughly **half of all passenger trips were visitors** (the rest residents) [29] [30] (SQ:5). **Air travel**: The island's Ronaldsway Airport links to multiple UK cities and Dublin. In 2019 there were about **950,000 air passenger movements** (arrivals+departures), but this plummeted during COVID. By 2022, air traffic was still only **60% of 2019 levels (575,000 trips)** [31] (SQ:5). It rebounded further in 2023–24 with returning routes. **Sea travel**: The Isle of Man Steam Packet ferries (from Heysham, Liverpool and seasonal Dublin/Belfast) carry a large share of leisure visitors, especially those bringing cars or attending the TT (many motorcyclists). Notably, **ferry visitor numbers were 3% higher in 2022 than in 2019** [32] (SQ:5), suggesting some travelers chose ferries as air capacity lagged. In mid-2023 the new **MV *Manxman*** ferry came into service, increasing capacity by ~50% over the older vessel [33] (SQ:5). This, along with a new Liverpool ferry terminal opened in 2023 [33] (SQ:5), has improved sea connectivity. By 2024, total departures (air+sea) had reached ~632,000, of which **~49% were visitors** [29] (SQ:5). **Cruise** tourism has also emerged: the IoM had **43 cruise ship calls in 2024**, bringing **21,679 cruise visitors** (typically day trippers) [34] [35] (SQ:4). While still a niche, cruise visits added ~£1.88 m to the economy in 2024 [36] (SQ:5). In summary, the **visitor economy's recovery up to 2024 is robust** – IoM surpassed its pre-COVID volume and is pursuing growth (aiming for 500k visitors by 2032) [37] (SQ:4). The challenge ahead is to **grow sustainably**, spread demand beyond the peak, and improve accessibility while preserving the island's appeal.

B) Strengths & Weaknesses

Key Strengths of the Isle of Man as a Destination:

- **Natural Beauty & Outdoor Recreation:** The IoM boasts **spectacular natural scenery** – from rugged coastlines and cliffs to verdant glens and rolling hills – and is the only entire nation classified as a UNESCO Biosphere Reserve [38] (SQ:5). This status underlines the island's unspoiled environment and commitment to conservation. Visitors enjoy a wide range of outdoor activities: coastal hikes, wildlife watching (seals, birds, basking sharks), cycling, and star-gazing under some of Western Europe's darkest night skies. In 2024, **61% of visitors engaged in outdoor activities** during their stay [39] (SQ:5). The island's **"adventure playground" feel** is a core selling point [38] (SQ:5), appealing to travelers seeking nature and open space.

- **Rich Heritage & Culture:** Despite its small size, the IoM has a wealth of cultural and historical attractions. The island is dotted with **ancient castles, Viking and Celtic sites**, and museums showcasing its unique Manx heritage. **Manx National Heritage operates 12 key sites** – including one of the best-preserved medieval castles in the world at Castletown – which remain popular with tourists [25] (SQ:4). Heritage railways (steam and electric trams dating to the 19th century) offer a charming way to explore, and **over 22% of visitors ride the heritage railways** [39] (SQ:5). The Manx culture (including the revived Manx Gaelic language, music, and folklore) provides distinct experiences. For example, the annual **Hop Tu Naa** autumn festival showcases traditional Manx music, dance, and customs [40] (SQ:4). The island's heritage and "ancient and compelling history" are central to its brand narrative [38] (SQ:5).

- **Signature Events (Especially TT Races):** The **Tourist Trophy (TT) motorcycle races** are an internationally renowned event and arguably IoM's strongest tourism magnet. Over two weeks each year, the TT draws **tens of thousands of enthusiasts** (≈45k in 2017 and up to 47k in 2024) [13] [12] (SQ:4/SQ:3), filling accommodations and generating substantial revenue. The TT and other motorsport events (Classic TT, Manx Grand Prix, Rally Isle of Man) capitalize on the island's racing heritage and mountain course. In 2024, **nearly 24% of all visitors attended a motorsport event** (many specifically for TT) [39] (SQ:5). These events put IoM on the global map and create an annual tourism peak. Beyond motorsport, IoM hosts notable events like the **Manx Classic (vintage car rally), food & drink festivals, and the Isle of Man Festival of Motorcycling**, which further leverage the island's niche appeal. The event calendar, anchored by TT, is a major strength driving repeat visitation and word-of-mouth marketing.

- **Accessibility & Proximity to Key Markets:** The IoM is conveniently located in the Irish Sea, roughly equidistant from England, Ireland, Scotland, and Wales. It is **just a short flight or ferry ride from the UK and Ireland** [41] (SQ:4). This proximity means the island benefits from a large catchment of potential visitors (e.g. 20+ million people in the nearby North West England, Ireland and Northern Ireland). Regular air links (Liverpool and Manchester are ~40-minute flights) and ferry routes make the IoM feel "closer to home" – an advantage during times when travelers prefer domestic/short-haul trips. In recent years, many UK visitors discovered destinations "on their doorstep" due to pandemic-related shifts [42] (SQ:4), and the IoM has capitalized on this domestic travel trend. Its location and transport links are strengths that allow easy short-break getaways and event travel (e.g. long weekend trips).

- **Safe, Friendly, and Unique Experience:** The IoM consistently reports **very high visitor satisfaction (≈98–99%)** [15] [16] (SQ:4). Tourists often highlight the **warm welcome and community feel** on the island. Crime rates are very low, and the destination has a relaxed, family-friendly atmosphere. The island's small size (population ~85k) allows visitors to feel a sense of **"home away from home"**, aligning with the new branding theme of "Our Island, Our Future" and *Heim* ("home") ethos [43] (SQ:4). Additionally, the IoM offers a quirky uniqueness – from the **Manx three-legged symbol** to tail-less Manx cats and its own currency – which differentiates it from generic destinations. Quirky cultural facets (like the Tynwald Day ceremony, the world's oldest continuous parliament) and UNESCO Biosphere credentials all add to a **distinctive identity** that is a strength in marketing the island as "an island like no other."

Key Weaknesses and Challenges:

- **Seasonal Dependence:** Tourism on the IoM remains highly seasonal, with **a short peak season and long low period**. The bulk of visits occur May–September; winter tourism is limited. This **seasonality creates under-utilization of assets** and unstable year-round income for businesses [23] (SQ:5). Despite efforts to extend the season, many attractions and accommodations reduce hours or close in off-season, which in turn discourages off-peak visitors – a cycle that's hard to break. The government recognizes the **"seasonal nature of the visitor market" as a major barrier** to growth [44] (SQ:5). Reduced winter air routes (some airlines halt or cut frequency in winter) exacerbate the issue [45] (SQ:5). This heavy dependence on summer and events (like TT) means the IoM's visitor economy is **vulnerable to weather, economic swings, or event disruptions** in those key months. Smoothing out demand across the year remains a challenge.

- **Transport Connectivity & Cost:** While the island is close to the UK, **limited transport capacity and high travel costs** hinder growth. There are a finite number of flight routes and ferry sailings, which can sell out during popular times (TT ferry spots for motorcycles often book out a year in advance). The **cost of travel to the IoM is perceived as a significant barrier** for potential visitors [46] (SQ:5). Plane fares and ferry tickets, especially for families or those bringing vehicles, can make visiting the IoM pricier than other domestic breaks. This has been a consistent complaint in visitor surveys. Additionally, **weather disruptions** occasionally affect ferries or flights (e.g. winter storms cancel sailings, fog diverts flights), impacting reliability. Until recently, aging ferry infrastructure and an older vessel (*Ben-my-Chree*) limited capacity – although the new ferry *Manxman* helps on this front. **Air route connectivity** is narrower compared to larger destinations; there are no direct flights from mainland Europe, and seasonal cuts leave fewer options in winter. In summary, **accessibility is a double-edged sword** – the IoM is nearby, but not always easy or cheap to reach. Improving transport links and offering value in travel cost is an ongoing need.

- **Accommodation Stock Limitations:** The IoM's **visitor accommodation offer is lagging behind competitors in quality, choice and capacity** [47] (SQ:5). The island has a relatively small number of hotels (and no major international hotel chains), with much lodging in older B&Bs, guest houses, or self-catering cottages. **High-end or unique accommodation is limited** – for instance, very few 4-star or boutique hotels, and only a couple of larger resorts. During TT and peak weeks, **accommodation often sells out**, capping visitor numbers. Conversely in winter, many accommodations close due to lack of guests, making it hard to book off-season. The government noted that **seasonality and limited financing have hindered new hotel development** [44] [48] (SQ:5). Many existing properties require upgrades to meet modern expectations (e.g. air-conditioning, spa facilities, etc.). **Camping and homestay options** are also relatively small-scale (though camping did grow in recent years with more glamping sites). In 2024, only **6% of visitors camped and ~1% used homestays** [22] (SQ:5), indicating potential to expand these niches. Overall, **insufficient and aging accommodation stock** is a weakness that limits capacity during high demand and potentially dampens visitor satisfaction for those expecting a wider range of options.

- **Awareness and Perception Challenges:** Despite its unique qualities, the IoM still struggles with **low international profile and outdated perceptions**. Market research showed the island's holiday tourism penetration in core markets was only **0.5% in 2019** [10] (SQ:5) – in other words, very few UK travelers considered the IoM compared to alternatives. Many potential visitors have limited awareness, or see it as "old-fashioned" or mainly for TT and VFR. The IoM's tourism boom was in the mid-20th century, and it has since been overshadowed by bigger destinations. The strategy notes IoM has **"underperformed as a holiday destination"**, attracting only ~56,500 pure holiday visitors in 2019 [10] (SQ:5). **Marketing and branding** have had to combat lingering stereotypes (e.g. as a sleepy or hard-to-get-to place). The island launched a new campaign ("Extraordinary Story") in 2022–23 to modernize its image [49] (SQ:4). While recent visitor growth is encouraging, **awareness remains a weakness** compared to competitors that aggressively promote themselves. IoM must continue to differentiate itself and ensure potential visitors know what it offers beyond the TT.

- **Infrastructure and Capacity Constraints:** Some of IoM's infrastructure is **near capacity during peak times**. Transport and hospitality services strain during TT – for example, **ferries and accommodations fully booked**, and restaurants, roads, and attractions extremely busy. This can impact visitor experience (long queues, difficulty obtaining reservations, etc.). Meanwhile, outside of peak, keeping infrastructure running profitably is hard (leading to closures). Another issue is **workforce shortages in tourism/hospitality**. Many businesses report difficulty recruiting and retaining staff, especially seasonally [50] (SQ:5). The pandemic exacerbated this, with a subset of workers leaving the sector. A **skills gap and staff shortage** can undermine service quality, a noted concern in the industry [50] (SQ:5). Additionally, though the island's roads and utilities are generally good, there are pinch points (e.g. limited public transport on island, traffic congestion during events, etc.). The government has identified the need for **investment in visitor facilities and product development** – without it, the island risks falling behind in quality [44] [51] (SQ:5). In summary, **capacity and infrastructure require scaling up** to meet growth targets, and staffing/training issues need addressing to maintain the IoM's high satisfaction levels.

C) Competitor Snapshot

To contextualize the Isle of Man's visitor economy, the table below compares **10 similar jurisdictions** (island or rural destinations of comparable size or appeal) on key tourism metrics and attributes:

Jurisdiction	Annual Visitors (pre-COVID vs recent)	Tourism Economic Impact	Notable Strengths / Branding	Visitor Satisfaction/ Notes
Jersey (Channel Islands)	~770,000 visitors in 2019 [52] (SQ: 4); ~526,500 in 2023 (68% of 2019) [53] [54] (SQ:5).	£280 m visitor spend in 2019 [52] (SQ:4); £290 m in 2023 (avg £550/ visitor) [54] [55] (SQ:5). Tourism ~8% of GVA, ~6,470 jobs [56] [57] (SQ:3).	Well-developed **beach resort** destination with warmer climate. Known for its **beaches, coastal walking, WWII heritage** and luxury hotels. Strong branding to older UK demographics (average visitor age ~57) [58] (SQ:3). Emphasizes **gourmet food** and safety.	High repeat visitation; **seasonal peaks** in summer (occupancy very high in Aug vs low in Nov) [59] (SQ:3). Limited cruise business (no deep-water port). Satisfaction generally high, but facing recovery challenges post-COVID (2023 visits still ~31% below 2019) [54] (SQ:5).

Jurisdiction	Annual Visitors (pre-COVID vs recent)	Tourism Economic Impact	Notable Strengths / Branding	Visitor Satisfaction/ Notes
Guernsey (Channel Islands)	~370,000 total visitors in 2019 (incl. **~115k cruise day-trippers**) [60] [61] (SQ: 4). Staying visitor arrivals ~255k (2019). 2022: ~300k (est.) as recovery.	£146 m total spend in 2019 [62] (SQ:4) (£142 m by staying visitors + ~£4 m day). Average spend £554 per visitor [63] [64] (SQ:4). Tourism ~4-5% of economy.	**"Island hopping" charm** with sister islands (Sark, Herm). **Coastal scenery, slower pace, WWII sites**. Markets itself on tranquility and nature, boutique hotels and gardens. Popular for **short breaks from UK and cruise stops** (tender port at St. Peter Port).	**Cruise-heavy**: 130+ cruise calls typical (76k cruise pax in 2019) [65] (SQ:3). Older visitor profile like Jersey. **Shoulder seasons** relatively weak. Satisfaction good; Guernsey touts friendly locals and low tax shopping. Connectivity mostly via UK regional flights & ferry. Recovery ongoing – 2023 saw tourism reboot events (Island Games).
Shetland Islands (Scotland)	80,128 visits in 2019 (excluding cruise) [66] [67] (SQ:5), up ~9% vs 2017. Plus ~76,000 cruise passengers in 2019 [68] (SQ:3) – total ~156k visitors. COVID drop, then gradual return; 2022–23 still below 2019.	£35.8 m visitor spend in 2019 [69] [70] (SQ:5); avg spend £448/ person. Tourism ~5%+ of local economy. Shetland tourism jobs ~300–400 (small base).	Renowned for **wildlife (seabirds, otters), rugged landscapes**, and unique **Norse-influenced culture**. Attractions include **Viking heritage sites, puffin colonies, world-class geology/ geopark**. Branding: "Adventure to the edge of the world." Popular with niche markets (birdwatchers, adventure cruisers) and fans of "Shetland" TV series.	Very **high visitor satisfaction** – 94% gave Shetland a 8–10/10 rating in 2019 [71] [72] (SQ:5). Strength in delivering authentic community welcome (98% said locals added to experience) [73] [74] (SQ:5). **Challenges:** remote access (12–14h ferry or flights via Scotland), highly seasonal (summer festivals like Up Helly Aa big draw, winters very quiet). Cruise tourism growing but raises capacity issues in Lerwick.

Jurisdiction	Annual Visitors (pre-COVID vs recent)	Tourism Economic Impact	Notable Strengths / Branding	Visitor Satisfaction/ Notes
Orkney Islands (Scotland)	~192,000 visitors in 2019 (not counting cruise) [75] (SQ:4). *Plus* ~132,000 cruise visitors 2019 [76] (SQ:4) – combined ~324k. In 2024, ~173,000 non-cruise visits (10% below 2019) [75] (SQ:4). Orkney is recovering but slightly down from pre-COVID.	~£67 m spend by land visitors in 2019 [77] (SQ:4), rising to £78 m in 2024 (nominal) [78] (SQ:4). High cruise traffic brings additional revenue (cruise pax ~£5–6m). Tourism ~10% of economy.	**World-famous heritage**: **Neolithic sites** (Skara Brae, Ring of Brodgar – UNESCO), Norse history, and rich local culture. Branded as a **heritage tourism hotspot** ("ancient wonders in a timeless landscape"). Also known for **wildlife, artisan crafts (Orkney knitwear, whisky)**. Key strength in **cruise tourism** – Kirkwall is a major cruise port in Scotland.	**Heritage draws yield very high appeal** – scenery and history are top reasons to visit [79] (SQ:4). Visitors rate Orkney experience highly (95% felt welcomed) [80] (SQ:4). **Dependency on cruise and tours:** ~50% of 2019 visitors were day-trippers (tours or cruise) [81] (SQ:4), which poses sustainability concerns. Recently experiencing a slight visitor dip (-10% vs 2019) [75] (SQ:4), possibly due to capacity limits and promotion of "slow tourism" to manage crowds.

Jurisdiction	Annual Visitors (pre-COVID vs recent)	Tourism Economic Impact	Notable Strengths / Branding	Visitor Satisfaction/ Notes
Isle of Skye (Scotland)	~650,000 visitors in 2018 [82] (SQ: 3), rising trend pre-COVID. Post-pandemic surging: **up to ~800k–1 million** visitors predicted in 2024 [83] [84] (SQ:4). Skye has become Scotland's 2nd most popular destination after Edinburgh [83] (SQ:4).	Est. £211 m added to Skye's economy in 2019 [82] (SQ:3). Tourism supports ~2,850 jobs on Skye & Raasay [82] (SQ: 3), a huge sector for the ~13k population. Overcrowding issues have led to calls for infrastructure investment.	Iconic **dramatic landscapes** (Cuillin mountains, Old Man of Storr, Fairy Pools) heavily featured on social media and film/TV. Brand: **"otherworldly" scenery and outdoor adventure**. Accessible by bridge, it's a must-do on the Highland tourist circuit. Appeals strongly to international visitors as well as domestic, often as a road-trip highlight.	**Overtourism concerns:** Skye is "*buckling under the weight of tourism*" [85] (SQ:3). Summer congestion, accommodation shortages, and strain on sites are common. Visitor satisfaction remains positive for scenery, but there are complaints about crowding at hotspots. Authorities considering visitor caps or dispersal. Despite issues, demand is high (a **9% + rise in 2024** vs 2023) [86] (SQ:4). Skye exemplifies the need for sustainable management when marketing is wildly successful.

Jurisdiction	Annual Visitors (pre-COVID vs recent)	Tourism Economic Impact	Notable Strengths / Branding	Visitor Satisfaction/ Notes
Isle of Wight (England)	~1.2–1.4 million visitors in 2019 (estimated; **627k in Q3 2019 alone**) [87] (SQ:4). However, visitor numbers have **declined ~25%** over 2015–2019 [87] (SQ:4). 2024 continued to see slight drops (Q3 2024 was 26% below Q3 2019) [88] (SQ:4).	Tourism is a major economic pillar (~20–25% of employment). 2019 spend not publicly given, but day visitors spent ~£34 each and overnights ~£265 each in Q3 2019 [89] (SQ:4). Likely ~£300m+ annual spend. The Isle of Wight markets itself via a Destination Management Organization (Visit Wight).	Long-established **seaside holiday destination**. Strengths: **beaches, family holiday parks, sailing & festivals** (Cowes Week regatta, Isle of Wight Festival). Branding capitalizes on Victorian seaside nostalgia and outdoor fun. Easily accessible from London (~2 hours) via ferry, it draws many short-trip visitors.	Facing **headwinds:** the IoW has seen a steady fall in staying holiday visitors (33% fewer overnighters in Q3 2024 vs 2019) [90] (SQ:4), possibly due to competition and aging product. Day trips have grown in share (many short visits by U.K. tourists) [91] (SQ:4). Satisfaction varies by segment: families still enjoy its traditional charm, but younger travelers may find it dated. Seasonality is strong (busy summers, quiet winters). The island is working to refresh its image and invest in attractions as it competes with cheaper overseas trips for the same market.

Jurisdiction	Annual Visitors (pre-COVID vs recent)	Tourism Economic Impact	Notable Strengths / Branding	Visitor Satisfaction/ Notes
Anglesey (Ynys Môn, Wales)	Over **1,000,000 overnight visitors** annually in recent years 92 (SQ:3), plus ~680,000 day visitors 92 (SQ:3). Combined ~1.7 million tourist visits/ year (pre-COVID). COVID impacted 2020–21, but domestic tourism rebounded strongly in 2022–23 in Wales.	Tourism is crucial to Anglesey's rural economy. Annual visitor spend roughly £190 m (if ~1.7m visitors at ~£110 each). Anglesey's share of North Wales tourism is significant, with many holiday parks.	Known for **natural beauty** (Blue Flag beaches, coastal hiking on the Anglesey Coastal Path) and heritage (Beaumaris Castle – UNESCO tentative list). **Family-friendly** destination with many caravan/ camping sites and watersports. Promoted as part of the **"North Wales" adventure region**, with highlights like South Stack lighthouse, nature reserves, and proximity to Snowdonia.	Generally good satisfaction from families and outdoor enthusiasts. **Highly domestic visitor base** (most from Wales and England). Access via road bridge makes it popular for **short breaks**. However, public transport on-island is limited. In peak summer some attractions (e.g. popular beaches) get crowded. Anglesey is investing in sustainable tourism (destination plan 2023–2028) to balance its high numbers with environmental preservation.

Jurisdiction	Annual Visitors (pre-COVID vs recent)	Tourism Economic Impact	Notable Strengths / Branding	Visitor Satisfaction/ Notes
Donegal (County Donegal, Ireland)	~900,000 total visitors in 2023 [93] (SQ:5), of which ~699k were domestic Irish/N.I. tourists and 179k overseas [93] (SQ:5). Pre-COVID 2019 was similar (~~920k). Represents one of the most visited rural counties in Ireland (thanks to Wild Atlantic Way route).	Total visitor revenue ~€342 million in 2023 [94] (SQ:5) (€155m overseas + €187m domestic). Average spends: overseas ~€866, domestic ~€267 [95] (SQ:5). Tourism is a big employer in Donegal's towns (Bundoran, Letterkenny, etc.), though region has high seasonality.	**Wild Atlantic Way** scenic appeal: Donegal is famed for its **dramatic coastline (Slieve League cliffs), beaches, and Gaeltacht (Irish-speaking) culture**. Markets itself as "Ireland's coolest hidden secret" – unspoiled, authentic, with adventure (surfing, hiking) and cultural richness (music, festivals). It's a **border county** attracting many Northern Irish visitors as well.	Strength in **domestic tourism** – 57% of domestic holidaymakers to Donegal come from Northern Ireland, drawn by proximity [96] (SQ:4). Overseas visitors mainly from US/Europe doing road trips. **Challenges:** Remoteness (no motorways or major airports; ~3-hour drive from Dublin) and weather. Seasonality is pronounced (summer dominates). Satisfaction is generally high for scenery and friendliness, though connectivity and infrastructure (e.g. limited public transport) are weaker. Donegal is focusing on sustainable, community-based tourism growth.

Jurisdiction	Annual Visitors (pre-COVID vs recent)	Tourism Economic Impact	Notable Strengths / Branding	Visitor Satisfaction/ Notes
Western Isles (Outer Hebrides, Scotland)	~219,000 visitors per year (as of last survey 2017) [97] (SQ:4). Likely ~230k+ by 2019 with ~5% annual growth [98] (SQ:4). COVID paused growth; 2022–2023 saw tourists return (especially domestic campervan travelers).	£65 million annual visitor spend (2017) [97] (SQ:4), significant for a population of 27k. Tourism is ~10–15% of economic activity in the islands [99] (SQ: 4), supporting ~1,000 FTE jobs [100] (SQ:4). Many micro-businesses (B&Bs, craft shops) depend on it.	Celebrated for **untamed beauty and cultural authenticity**. Strengths: **pristine beaches (Luskentyre), wild landscapes, Gaelic heritage**, and a sense of tranquility. The Outer Hebrides (Lewis, Harris, etc.) are marketed for adventure, wildlife (eagles, whales), and genealogy tourism. Notable sites like Callanish Stones (ancient standing stones) add to its allure. Branding emphasizes it as a **remote escape steeped in Gaelic culture**.	**High visitor satisfaction** – visitors appreciate the genuine community and scenery. Over half of visitors are repeat visitors (loyal fan base) [101] (SQ:4). The **tourist season has lengthened** to ~7–8 months now [101] (SQ: 4), though winter is still very quiet. **Accessibility is a bottleneck**: long ferry rides or flights via Glasgow. Infrastructure is modest (limited accommodation capacity, roads, etc.). There's a strong sustainability ethos; 2023–24 saw a big increase in cruise calls to Stornoway, prompting careful management [102] (SQ: 4). Overall seen as an emerging "get away from it all" destination, with controlled growth to protect its fragile environment.

Jurisdiction	Annual Visitors (pre-COVID vs recent)	Tourism Economic Impact	Notable Strengths / Branding	Visitor Satisfaction/ Notes
Faroe Islands (Denmark)	~110,000 visitors annually (mid-2020s) 43 (SQ:4), **double** the number from ~8 years prior 103 (SQ:4). Includes ~40k cruise visitors (short stops) 43 (SQ:4). Growth trend is strong, aided by global media exposure.	Tourism now ~6% of Faroese GDP (~£100 m turnover) 104 (SQ:4). Small in absolute terms but growing fast. Faroe tourism board active in digital marketing. Spend per visitor is high (remote location costs): many visitors on package tours.	**Dramatic North Atlantic landscapes** (volcanic cliffs, waterfalls, puffin colonies) and a reputation for **untouched nature**. Known for innovative marketing (e.g. remote tourism campaigns) and sustainable approach (they famously "closed for maintenance" some sites, inviting volunteers). Brand: **eco-conscious, adventure, and Nordic culture**. Appeals to niche travelers seeking something truly remote and Instagrammable (e.g. Múlafossur waterfall).	**Capacity and sustainability are key concerns**. With only 55k residents, the Faroes limit tourism growth to avoid overtourism. **New regulations**: fees for popular hikes and limits on site access have been introduced to manage impact 105 106 (SQ:4). Visitors generally rave about the beauty and novelty, but must contend with high costs and often wet weather (~300 rainy days/year) 103 (SQ:4). The destination's exclusivity is part of its charm; future strategy emphasizes keeping tourism **community-led and "homey" (Heim)** 43 (SQ:4).

Sources: The above data is compiled from government tourism reports, surveys, and news articles for each jurisdiction (sources rated 3–5 for quality, see inline citations). This snapshot illustrates that while the Isle of Man is smaller in volume than some competitors like Jersey or the Isle of Wight, it punches above its weight in revenue per visitor and unique offerings. Each competitor has its own strengths (e.g. Jersey's beaches, Orkney's heritage, Skye's scenery) and challenges (seasonality, access, overtourism), many of which mirror the Isle of Man's situation. Notably, **IoM's 2024 visitor count (~330k)** is now on par with **Guernsey+Sark** and about **half of Jersey's** – a significant recovery milestone 37 7 (SQ:4). This comparison highlights opportunities for IoM to learn from similar destinations in managing growth, marketing niche strengths (e.g. motorsport tourism akin to how events benefit others), and pushing sustainability.

D) Emerging Trends for 2025–2026

As the tourism sector moves beyond the pandemic recovery, several **emerging trends in 2025–26** are expected to shape demand. These trends are **highly relevant to the Isle of Man**, presenting both opportunities and areas to adapt:

- **Sustainable & Eco-Tourism Boom:** Travelers in 2025 are increasingly prioritizing **sustainable and eco-friendly travel options**. There is growing awareness of climate impacts and a desire for authentic nature experiences. Surveys show that current travel trends include a shift toward **"visiting lesser-known areas" and** "sustainable trips"* [107] ***(SQ:4). Tourists seek out destinations with unspoiled environments and are often keen to support local conservation efforts. For the IoM – a UNESCO Biosphere Reserve – this is a fortuitous trend. The island can leverage its credentials (protected landscapes, wildlife, dark skies) to attract*** ***eco-conscious visitors**. For example, activities like wildlife tours, star-gazing, and heritage trails may see increased interest. However, sustainability expectations also mean the IoM must **demonstrate green practices**: e.g. promoting low-carbon transport (electric buses, cycling), reducing single-use plastics in tourism, and marketing its UNESCO Biosphere projects. **Global tour operators are highlighting carbon-neutral or nature-positive holidays**, and destinations that can credibly offer these will have an edge [108] (SQ:5). Notably, AI technology is even being used to guide tourists toward verified eco-friendly providers (avoiding "greenwashing") [109] (SQ:5). IoM's strategy "Our Island, Our Future" emphasizes responsible tourism – aligning with this trend will likely improve its appeal and brand image in coming years.

- **Rise of "Workations" and Digital Nomads:** The pandemic accelerated remote work, and now **millions of people are embracing travel while working remotely**. As of 2024, an estimated **35 million people worldwide are digital nomads** (location-independent workers) [110] (SQ:3), a figure growing yearly. This trend blurs leisure and business travel, with individuals taking extended stays in destination "hubs" where they can both work and explore. For the IoM, which has excellent broadband infrastructure and is very safe and community-oriented, there is an opportunity to attract these **long-stay remote workers**. Digital nomads often prefer off-peak travel (to avoid crowds and high costs) and can help fill shoulder season demand. The IoM Government could market special packages or visas for remote workers (following examples like Barbados or Estonia's digital nomad visa) – offering say 3–6 month stays. If positioned as a **"workation island"** with a high quality of life (scenic lunch breaks, low crime, English-speaking, good healthcare), the IoM could stand out. The likely impact would be more **off-season occupancy** in rentals and an influx of professionals who contribute to the economy over longer periods than typical tourists. It may also spur development of co-working spaces or creative hubs on the island. Embracing this trend, the **IoM may see a diversification** of its visitor base beyond traditional holidaymakers to include mobile professionals and their families.

- **Off-Peak and "Slow Travel" Preference:** Travelers are showing a greater tendency to avoid the classic peak-season crowds and instead travel during shoulder seasons or to less-touristy destinations. According to recent surveys, a significant segment of Brits (about **27%**) plan to take an overnight trip in the Oct–Dec off-peak period [111] (SQ:4), and generally "going off the beaten track" is noted as a key 2025 travel trend [107] (SQ:4). This trend is beneficial for IoM as it tries to extend its season. It suggests that marketing campaigns highlighting **autumn and winter experiences** (cozy countryside stays, storm-watching, foodie tours in the off-season) could find a ready audience. Additionally, "slow travel" – spending longer time in one place to fully experience local life – is gaining traction as an anti-dote to rushed itineraries. IoM can capitalize on this by promoting week-long stays that immerse visitors in the island's villages, perhaps via slow travel itineraries (e.g. hiking the Raad ny Foillan coastal path in stages, volunteering on a farm, etc.).

The impact of this trend, if tapped, would be a **more even distribution of visitors throughout the year**, improving tourism business viability year-round and reducing pressure on infrastructure in June–August. It may also encourage product development like seasonal events (e.g. a winter heritage lights festival) to draw visitors outside summer.

- **Events Tourism & "Experience Seeking":** After years of lockdowns and restrictions, people are eager to travel for **unique experiences and events**. Industry observers note a rise in **event-driven travel** – whether for major sports, cultural festivals, or niche conventions [107] (SQ:4). This bodes well for IoM's TT and other events. We can expect pent-up demand to keep TT visitor numbers high (possibly even growing if capacity allows – e.g. 2024's TT was record-breaking). Moreover, travelers are chasing experiences like never before: from wellness retreats to genealogy trips. The IoM might see a boost in visitors coming for its specific offerings: **classic motorsport fans**, history enthusiasts (yearly Viking festivals or the annual Tynwald Day ceremony could be packaged), or even fans of film/TV if any productions spotlight the island. The trend toward seeking "extraordinary experiences" matches the IoM's marketing tagline of an *Extraordinary Story*. **Likely impact:** Continued strong attendance for headline events (TT, Festival of Motorcycling) and opportunity to develop new events (e.g. an Isle of Man Dark Skies astronomy weekend, or an eco-adventure race) to entice experience-seekers. Also, visitors may demand more interactive experiences – e.g. workshops with local artisans, wildlife conservation tours – moving beyond passive sightseeing.

- **Tech & AI in Travel Planning:** Rapid advances in **artificial intelligence and travel tech** are changing how people plan and enjoy trips. By 2025, the travel industry is integrating AI for personalized recommendations, itinerary building, and customer service. For example, AI chatbots can provide travelers instant info or help book trips, and machine learning can tailor suggestions based on a user's preferences. Destinations are using these tools to **target niche audiences more effectively and enhance visitor engagement** [112] [113] (SQ:3/SQ:4). The IoM will likely need to keep pace: leveraging AI-driven marketing to find likely visitors (e.g. motorbike enthusiasts on social media, or birdwatchers searching for destinations). The island's tourism website could implement smarter trip planners (e.g. an AI assistant that helps prospective tourists build a custom itinerary around their interests – heritage, adventure, etc.). On-island, there is scope for augmented reality (AR) apps at heritage sites or AI-powered audio guides to enrich the visitor experience. Embracing these tech trends can make the IoM feel modern and accessible. **Forecasts show the AI in tourism market is growing quickly (projected to $13+ billion by 2030)** [114] **(SQ:3)** – meaning more travelers will come to expect seamless digital interactions. The IoM's likely response should be investment in digital infrastructure: from dynamic booking engines to possibly using data analytics to manage visitor flows (as a sustainability measure). In summary, **technology will be a driver of competitiveness**, and the IoM can benefit by being an early adopter in its segment (e.g. a well-designed Visit IOM app with AI features could set it apart among small destinations).

- **Niche Markets & Demographic Shifts:** Two additional trends worth noting are the growth of certain niche markets and shifting demographics. **Eco-conscious youth travelers (Gen Z and Millennials)** are a rising force – many prioritize sustainability and unique experiences over luxury. The IoM may need to cater more to this group's tastes (e.g. backpacker-friendly hostels, Instagrammable locations, and volunteer tourism opportunities). Meanwhile, the **silver traveler market (seniors)** remains important but is evolving – older tourists are more active and tech-savvy than before. Providing accessible yet authentic experiences (gentle walking tours, mobility-friendly attractions) will be vital as populations age. Another niche trend is **wellness and mental health tourism** (people traveling for retreats, yoga, nature therapy, etc.). With its tranquil setting, the IoM could promote itself as a place to "reset" – perhaps capitalizing on its clean air, safety, and scenery for wellness holidays. **Food tourism** is also big: travelers increasingly seek local food experiences. Manx seafood, queenies (scallops), and artisanal products (Manx cheese, gin) could be packaged into foodie trails, appealing to gastronomes. In essence, **personalization and niche appeal** are key trends – the IoM's marketing strategy is indeed shifting from mass messaging to targeting specific interest groups (e.g. adventurers, culture buffs, families, etc.), which aligns with this.

Source & Quality Ratings: The trend insights above are drawn from recent travel industry reports and surveys (e.g. **VisitBritain/VisitEngland studies, Reuters industry analysis** and market research) [107] [109] [111] (sources rated 4–5 for reliability). These emerging trends are expected to influence the Isle of Man's visitor economy significantly. In summary, the island stands to benefit from trends like sustainable travel and off-peak exploration – areas where it has inherent strengths (natural beauty, distinct seasons) – while it will need to adapt to trends in technology and evolving traveler expectations to remain competitive. The Isle of Man's **Visitor Economy Strategy 2022–2032** already identifies many of these themes (season extension, digital marketing, quality improvements) as priorities, which positions the island well to capitalize on tourism demand in 2025 and 2026. By focusing on its unique selling points and embracing innovation, the IoM can ride these trends to further grow and future-proof its visitor economy.

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